



USDA National Retail Report - Turkey

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 02/27 thru 03/05.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Feb 27, 2015

NATIONAL SUMMARY

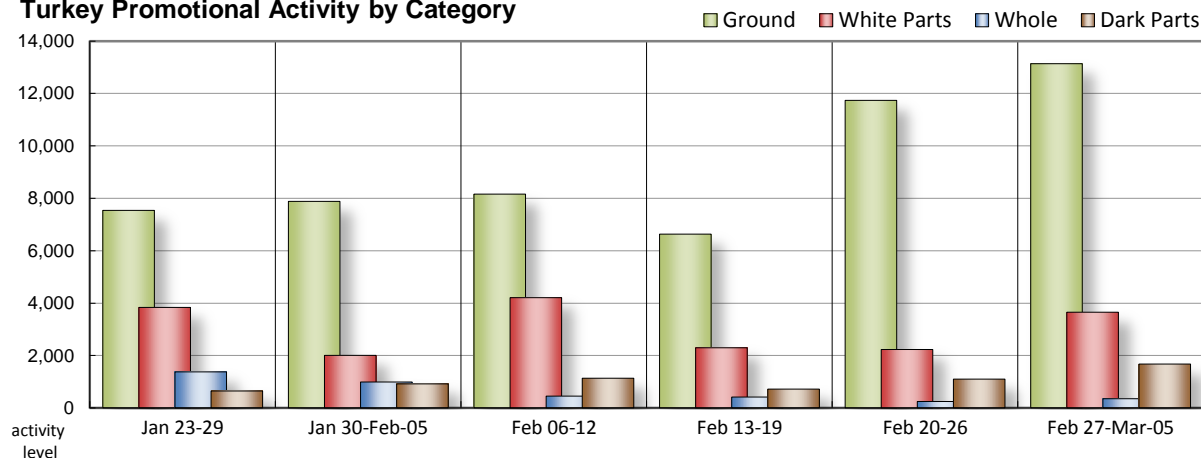
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	40.4% of 29,100 outlets		53.9% of 29,100 outlets		45.2% of 22,900 outlets	
Special Rate ^{4/}	0.8%		0.0%		1.0%	
Activity Index ^{2/}	20,286		20,911		19,690	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	216	1.31	85	1.18	710	1.16
" - Toms	132	1.51	157	0.95	600	1.04
PARTS:						
Breast:						
Bone-in, whole						
Fresh	5	2.99	56	2.79	120	2.99
Frozen	1,157	1.78	1,353	1.54	1,920	1.80
Split, bone-in						
Fresh	106	1.99	106	1.99		
Rotisserie	85	9.21	81	6.99	140	5.99
Boneless, whole	28	4.99	69	5.40	50	5.19
Cutlets	506	5.05	464	5.08	410	5.21
Cutlets, thin sliced	8	6.99	8	6.99	240	4.99
Strips					230	5.45
Tenders	42	5.33			250	4.75
Marinated Tenders	1,712	4.55	89	4.31	450	4.22
Drumsticks	304	1.80	352	2.22	480	2.14
Thighs	144	1.91	298	2.35	230	2.51
Wings	269	2.09	125	1.90	480	2.14
Necks	33	1.89	37	1.95	130	1.72
Smoked Drumsticks	304	2.02	99	2.35	110	2.37
Smoked Wings	452	2.01	89	2.33	110	2.18
Smoked Necks	165	2.04	96	2.34	100	2.14
GROUND TURKEY:						
Patties	1,474	3.50	345	3.26	670	3.80
Sausage	1,705	3.52	582	3.25	1,560	3.45
85% lean	3,298	2.74	2,648	2.58	2,540	2.63
93% lean	2,918	3.16	7,267	3.38	2,340	3.21
Breast	3,738	4.68	891	4.48	2,260	4.90
Rolls (frsh/frz 1 lb.)	458	2.84	3,891	2.68	840	2.43
Specialty ^{5/}						
Patties			51	3.49		
93-94% lean	293	4.53	1,672	4.38	1,480	4.18
Breast	734	5.99			1,240	6.48

Note: rolls & specialty not included in ground turkey total and weighted average.

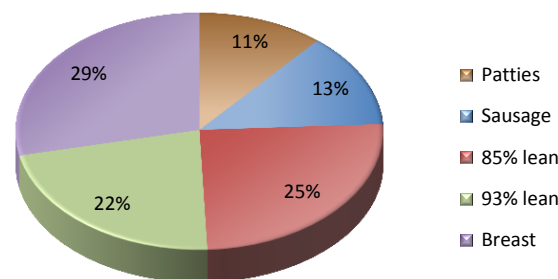
This Week's Turkey Feature Highlights

Retail feature activity is slightly lower this week. There is limited interest in featuring whole turkeys, only a few ads on frozen hens and turkeys at higher prices. Offerings slow on frozen bone-in breasts; prices are higher. Once again, there are very few ads promoting rotisserie breasts. More stores are offering boneless white parts, especially marinated tenders. Feature activity increases on dark parts; prices are mostly lower. Featuring continues to increase on ground turkey; the weighted average price is higher on all items except the 93% lean. This week ground breast is the mostly actively promoted grind. Offerings slow on rolls and specialty grinds. Deli featuring increases on service deli and self-service deli items. Service deli featuring is most active on thick slicing meats. Advertised prices on self-service deli items are higher on the 7-10 oz. sizes, lower on the 16 oz. sizes.

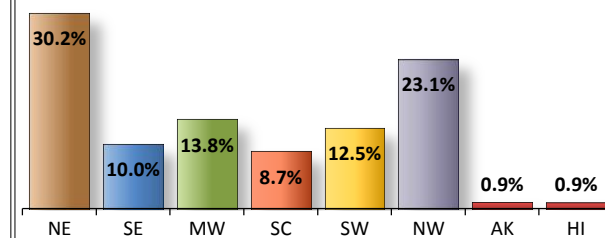
Turkey Promotional Activity by Category



Ground Turkey Featuring by Type



Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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Fri. Feb 27, 2015

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Special Rate ^{4/}	64.9% of 5,500 sampled outlets			40.2% of 7,400 sampled outlets			32.4% of 6,100 sampled outlets		
Activity Index ^{2/}	0.0% of stores w/ no-price promotions			1.3% of stores w/ no-price promotions			0.2% of stores w/ no-price promotions		
	Activity Index = 7,731			Activity Index = 3,475			Activity Index = 3,207		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99 - 1.69	25 1.58		0.99 - 1.69	4 1.34				
" - Toms	0.99 - 1.69	25 1.58		1.69	2 1.69				
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99	5 2.99							
Frozen	1.88 - 1.99	191 1.90		1.41 - 1.99	51 1.48		1.38 - 1.99	244 1.56	
Split, bone-in									
Fresh							1.99	106 1.99	
Rotisserie	6.99	22 6.99							
Boneless, whole	4.99	28 4.99							
Cutlets	4.99 - 5.99	251 5.03		4.99 - 5.59	35 5.56		4.99	180 4.99	
Cutlets, thin sliced	6.99	8 6.99							
Strips									
Tenders				5.59	33 5.59				
Marinated Tenders	3.73 - 4.79	604 4.41		4.53 - 4.66	1,037 4.66		4.26 - 4.66	17 4.33	
Drumsticks				1.69	101 1.69		1.69 - 2.59	163 1.88	
Thighs	1.99	21 1.99		1.99	2 1.99		1.79 - 2.59	121 1.89	
Wings	2.99	39 2.99		1.59 - 2.99	26 2.51		1.69 - 2.59	163 1.88	
Necks							1.79 - 1.99	33 1.89	
Smoked Drumsticks	1.99 - 2.49	303 2.02		1.99	1 1.99				
Smoked Wings	1.99 - 2.49	440 2.01		1.99	1 1.99		1.99	11 1.99	
Smoked Necks	1.99 - 2.49	154 2.05					1.99	11 1.99	
GROUND TURKEY:									
Patties	2.99 - 3.99	1,071 3.58		2.99 - 3.99	44 3.01		3.50 - 3.99	213 3.56	
Sausage	3.19 - 3.99	1,203 3.58		3.19 - 3.99	5 3.83		3.19 - 4.09	370 3.59	
85% lean	2.29 - 3.99	1,389 2.71		2.66 - 3.99	468 2.99		1.99 - 3.99	731 2.70	
93% lean	2.68 - 3.84	643 3.27		1.99 - 3.50	1,269 3.02		1.99 - 3.99	605 3.02	
Breast (99-100% lean)	4.61 - 5.38	1,121 4.69		3.99 - 4.99	355 4.32		3.99 - 4.79	131 4.09	
Rolls (frsh/frz 1 lb.)							1.88 - 3.33	100 3.08	
Specialty ^{5/}									
Patties									
93-94% lean	3.29 - 4.99	106 3.72							
Breast	5.99	82 5.99		5.99	41 5.99		5.99	8 5.99	



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	SOUTH CENTRAL U.S. (AR,CO,KS,LA,MO,NM,OK,TX)			SOUTHWEST U.S. (AZ,CA,NV,UT)			NORTHWEST U.S. (ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	25.2% of 4,900 sampled outlets			31.3% of 3,800 sampled outlets			61.3% of 1,300 sampled outlets		
Special Rate ^{4/}	2.8% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,036			Activity Index = 2,102			Activity Index = 1,610		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99	82 0.99					1.49	105 1.49	
" - Toms							1.49	105 1.49	
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 2.59	302 1.80		1.69 - 1.98	225 1.89		1.79 - 1.99	135 1.87	
Split, bone-in									
Fresh									
Rotisserie							9.99	61 9.99	
Boneless, whole									
Cutlets	4.99	40 4.99							
Cutlets, thin sliced									
Strips									
Tenders				4.39	9 4.39				
Marinated Tenders				3.99	26 3.99		3.99 - 4.66	28 4.11	
Drumsticks				1.79	40 1.79				
Thighs									
Wings				1.79	41 1.79				
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	2.99	146 2.99							
Sausage	2.69 - 2.79	127 2.70							
85% lean	1.99 - 2.99	435 2.66		2.00 - 3.19	258 2.71		2.00 - 2.99	17 2.06	
93% lean	2.49 - 3.33	125 3.09		3.49 - 3.83	135 3.53		3.33 - 4.39	141 4.23	
Breast (99-100% lean)	4.16 - 4.79	383 4.73		4.79	882 4.79		3.99 - 4.79	752 4.65	
Rolls (frsh/frz 1 lb.)	1.88 - 2.59	47 2.27		1.88 - 3.29	242 3.13		1.88	69 1.88	
Specialty ^{5/}									
Patties									
93-94% lean							4.99	187 4.99	
Breast	5.99	349 5.99		5.99	244 5.99		5.99	10 5.99	



(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	ALASKA (AK)			HAWAII (HI)		
Feature Rate ^{1/}	46.2% of 100 sampled outlets			30.1% of 100 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 64			Activity Index = 61		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens						
" - Toms						
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	1.98 - 1.99	9	1.99			
Split, bone-in						
Fresh						
Rotisserie	9.99	2	9.99			
Boneless, whole						
Cutlets						
Cutlets, thin sliced						
Strips						
Tenders						
Marinated Tenders						
Drumsticks						
Thighs						
Wings						
Necks						
Smoked Drumsticks						
Smoked Wings						
Smoked Necks						
GROUND TURKEY:						
Patties						
Sausage						
85% lean						
93% lean						
Breast (99-100% lean)	3.99 - 5.59	53	5.26	5.59 - 5.75	61	5.68
Rolls (frsh/frz 1 lb.)						
Specialty ^{5/}						
Patties						
93-94% lean						
Breast						



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Fri. Feb 27, 2015

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate ^{1/}	71.8% of 29,100 stores		58.1% of 29,100 stores		63.7% of 22,900 stores		82.0% of 5,500 sampled outlets			75.8% of 7,400 sampled outlets		
Activity Index 2/	56,858		44,695		43,340		Activity Index = 17,360			Activity Index = 13,815		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	5,001	8.61	6,412	8.43	3,930	8.05	6.88 - 11.99	2,532	8.91	6.99 - 9.99	608	9.18
Private Brand	6,995	7.36	2,096	7.38	1,880	7.42	6.98 - 9.49	1,022	7.33	6.98 - 8.49	1,480	7.15
Category 2												
Processor Brand	3,525	5.73	3,456	6.07	4,240	5.97	4.98 - 6.99	826	6.38	4.98 - 6.99	449	5.54
Private Brand	5,422	7.56	4,969	6.98	2,500	6.47	4.99 - 7.99	2,600	7.38	7.99	84	7.99
Category 3												
Processor Brand	694	4.29	1,037	4.05	1,290	3.85	3.99 - 4.99	263	4.65	2.99 - 4.99	14	3.92
Private Brand	1,187	4.97	78	4.65	70	4.29	3.99 - 4.99	175	4.87	4.99	1,002	4.99
Turkey Ham												
Processor Brand	456	3.71	399	4.18	200	3.52	3.29 - 4.99	296	3.91	4.99	2	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	382	4.73	223	4.89	80	3.95	4.49 - 4.99	360	4.79			
Private Brand			118	4.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	2,678	7.86	4,197	7.29	2,820	7.69	5.99 - 9.99	1,381	8.04	6.99 - 7.99	196	7.14
Private Brand	2,500	7.51	983	6.89	1,860	6.76	6.99 - 7.99	1,551	7.85	6.49 - 6.99	171	6.74
Category 2												
Processor Brand	250	5.12	92	6.46	210	4.91	4.99	144	4.99	4.99	33	4.99
Private Brand	1,115	4.99	220	5.99	190	5.87	4.99	110	4.99	4.99	1,002	4.99
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	8,959	3.56	8,623	3.47	9,240	3.08	2.50 - 4.99	2,659	3.53	1.79 - 4.79	2,673	3.44
Private Brand	3,397	2.96	1,596	2.90	2,740	3.11	2.98 - 3.50	652	3.14	2.99 - 3.33	745	3.02
Turkey 16 oz												
Processor Brand	1,649	5.72	496	5.81	940	4.99	5.99	21	5.99	5.99	949	5.99
Private Brand	1,083	4.50	119	4.99	40	3.99				4.50	1,083	4.50
Chicken 7-10 oz												
Processor Brand	8,230	3.58	8,153	3.48	8,950	3.09	2.50 - 4.99	2,178	3.50	2.49 - 4.79	2,579	3.47
Private Brand	3,335	2.95	1,428	2.87	2,160	3.05	2.98 - 3.33	590	3.10	2.99 - 3.33	745	3.02

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



USDA National Retail Report - Turkey

Fri. Feb 27, 2015

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 02/27 thru 03/05.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	71.6% of 6,100 sampled outlets			61.8% of 4,900 sampled outlets			58.7% of 3,800 sampled outlets			84.1% of 1,300 sampled outlets		
Activity Index 2/	Activity Index = 10,146			Activity Index = 6,868			Activity Index = 5,085			Activity Index = 3,347		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.99 - 8.99	705 7.82		6.99 - 8.99	593 8.15		7.99 - 12.99	490 8.14		7.99 - 9.99	29 9.37	
Private Brand	6.98 - 12.99	1,730 7.48		6.98 - 9.49	1,855 7.40		6.98	344 6.98		6.98 - 12.99	546 7.77	
Category 2												
Processor Brand	4.98 - 6.99	1,325 5.44		4.98 - 6.49	209 5.15		4.99 - 5.99	183 5.02		4.49 - 6.99	528 6.10	
Private Brand	4.98 - 6.99	238 6.10		5.99 - 7.99	448 7.30		5.99 - 8.99	1,378 7.95		7.99	578 7.99	
Category 3												
Processor Brand	2.99 - 4.29	61 3.61		2.99 - 3.99	73 3.50		2.99 - 5.99	228 4.11		2.98 - 5.99	55 5.26	
Private Brand	4.49 - 4.99	10 4.64										
Turkey Ham												
Processor Brand	2.99 - 3.58	15 3.27		3.59	16 3.59		2.99 - 3.99	64 3.78		2.79	61 2.79	
Private Brand												
Turkey Pastrami												
Processor Brand	3.58 - 3.99	22 3.86										
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 8.99	337 7.67		6.99 - 8.49	418 7.56		7.99 - 11.99	191 8.18		7.99 - 8.99	155 8.04	
Private Brand	5.99 - 8.49	433 6.95		6.49 - 8.49	221 7.09		6.99	1 6.99		6.99	123 6.99	
Category 2												
Processor Brand	3.99 - 5.99	73 5.44										
Private Brand	4.99	3 4.99										
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.00 - 4.79	1,706 3.22		2.50 - 3.50	698 3.92		2.50 - 4.49	743 4.14		2.50 - 4.98	448 4.08	
Private Brand	2.99 - 3.33	760 3.00		2.50 - 3.00	753 2.82		2.50 - 3.00	295 2.99		2.50 - 2.99	188 2.50	
Turkey 16 oz												
Processor Brand	4.98 - 5.99	315 5.09		5.49 - 5.99	234 5.86		4.99	130 4.99				
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.00 - 4.79	1,653 3.25		2.79 - 3.59	597 4.13		2.50 - 4.49	743 4.14		2.50 - 4.98	448 4.08	
Private Brand	2.99 - 3.33	760 3.00		2.50 - 3.00	753 2.82		2.50 - 3.00	295 2.99		2.50 - 2.99	188 2.50	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	ALASKA (AK)			HAWAII (HI)				
Feature Rate ^{1/}	51.6% of 100 sampled outlets			73.5% of 100 sampled outlets				
Activity Index 2/	Activity Index = 122			Activity Index = 115				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg			
SERVICE DELI - Turkey								
Category 1								
Processor Brand	9.99	1 9.99		7.49 - 7.99	43 7.56			
Private Brand	6.98	8 6.98		6.98	10 6.98			
Category 2								
Processor Brand	4.49	5 4.49						
Private Brand	8.99	42 8.99		8.99	54 8.99			
Category 3								
Processor Brand								
Private Brand								
Turkey Ham								
Processor Brand	2.79	2 2.79						
Private Brand								
Turkey Pastrami								
Processor Brand								
Private Brand								
SERVICE DELI - Chicken								
Category 1								
Processor Brand								
Private Brand								
Category 2								
Processor Brand								
Private Brand								
SELF-SERVICE DELI								
(dollars per tub or pouch)								
Turkey 7-10 oz								
Processor Brand	3.99 - 5.49	32 4.97						
Private Brand				3.00	4 3.00			
Turkey 16 oz								
Processor Brand								
Private Brand								
Chicken 7-10 oz								
Processor Brand	3.99 - 5.49	32 4.97						
Private Brand				3.00	4 3.00			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)